



Purchase Order (PO) Change Order Requests

This guide outlines the process for submitting change orders to existing UNIV purchase orders in Workday. Change orders can be submitted for POs that are either not invoiced or partially invoiced. Please note that change orders do not apply retroactively; they only affect new charges moving forward.

Common reasons for a Change Order

Any update to a purchase order requires valid vendor documentation to be attached to the request.

- **Adding Funds**
- **Updating Dates of Service**
- **Adding or Canceling Lines** (e.g., adding items that were received but not listed on the original PO)
- **Item Substitutions** (Updating item numbers or descriptions due to backorders or alternate items)
- **Updating Worktags**
 - *Constraint:* This can **only** be processed if the line has **not** yet been invoiced and paid. Additional situations may restrict the change to worktags, please contact your BSC associate for additional information.
- **Adjusting Quantity**
 - *Note:* If fewer items were received than ordered, a PO closure can be used to release the encumbrance (requires vendor documentation confirming the order is complete).

Critical Alerts Before You Begin

- **Buckeye Buy Requests:** If the original request was submitted through Buckeye Buy, DO NOT process the change order through Buckeye Buy. Follow the standard Workday process below to allow the Business Service Center (BSC) to update your original PO.
- **Future Charges Only:** Change orders apply to future charges only. They cannot be used to adjust charges that have already been paid.

- **Invoicing Constraint:** You cannot update worktags if the line item has already been invoiced and paid.

How to submit a Change Order request

Important Note for Buckeye Buy: Do **not** process change order requests through Buckeye Buy, even if the original request was submitted there. Follow the Workday process below to allow the BSC to update your original PO.

1. **Initiate Request:** In Workday, start a new requisition.
2. **Select Item:** Click the “**Request Non-Catalog Item**” link.
3. **Set Type:** Change the Requisition Type to “**Change Order**”. This can be done at the checkout screen or using the “Edit Details” button.
4. **Complete Internal Memo:** You must include the following details in the Internal Memo field:
 - The original purchase order number.
 - A detailed explanation of the change (e.g., adding funds, changing dates, cancelling lines).
 - The reason for the change.
5. **If possible, add 1 line with quantity of 1:** Summarize the requested changes here as they should appear on the updated PO. The unit cost should be the new final total of the PO.
 - **Specifics:**
 1. If updating **Worktags:** List "Current Worktags" vs. "New Worktags."
 2. If updating **Split Funding:** Indicate the specific dollar amount or percentage split for the new funds. (This may require additional lines on your requisition)
6. **Upload Documentation:** Supporting documentation.

What Happens Next? Once the Business Service Center (BSC) reviews and enters the change order to the PO, the pending PO changes will route through the necessary approvals.

- **Note:** When the changes are finalized on the original PO, this specific change order requisition will show a status of **Cancelled**. This is normal and indicates the process is complete. **The department is responsible for forwarding the updated PO to the supplier.**

Best Practice

Catering Events

1. When to Submit: Avoid processing change orders during the week of the event, as costs often fluctuate.

- **Recommendation:** Wait until you receive the **final invoice**. This allows you to capture all adjustments in a single Change Order.

2. Compliance Check: Before submitting, review your **original PO**. Did it include the **Final Attendee List, Ad-hoc Attendance** and **Alcohol Approval** (if applicable) before the event?

- **If No:** You must include these documents with your change order.

Independent Contractor Agreement (ICA) Amendments

If you are submitting a change order to update funds or dates of service on an ICA, you must attach:

- **ICA Amendment Form:** Required for *all* changes to funds or dates.
- **Updated OPERS Form:** Required *only* if the **Dates of Service** are changing.

Bid Waiver

When is a new bid waiver required? You must submit a new waiver if your change order causes either of the following:

1. The PO total exceeds **\$75,000** for the first time.
2. The PO was *originally* issued as a bid waiver (regardless of the new total).

Documentation Checklist:

- **Waiver Request Form:** Waiver form must be signed by all representatives with appropriate signature authority.
 - *Note:* The amount on the form must match the **New Cumulative Total** (Original PO + Change Order Amount + Shipping).
- **Supporting Documentation:** Attach an updated pricing document or quote that reflects the added amount or the new total cost.

Changes to PO that do not require a Change Order

BSC can edit a PO without a change order to update the following items only: shipping terms, vendor's remit to address, ship to address, add comments to Memo to Supplier. Please email your BSC Procurement associate with the details of your request to initiate the update. Please note additional approval may be required for some changes.

Change order examples

Single line price increase

Example 1:

- **Internal memo:**
 - Change order to PO-100xxxxxxx to match the expected final invoice amount. Increase Line 1 from \$15,000 to \$16,000 to cover the cost of additional scanning hours in April. For a new PO total of \$16,000.
- **Goods line item description:**
 - Change order request for PO-100xxxxxxx to add \$1,000.00 to increase from \$15,000.00 to \$16,000.00.
- **Goods line quantity requested:**
 - 1
- **Goods line unit cost:**
 - \$16,000

Example 2:

- **Internal memo:**
 - Change order to PO-100xxxxxxx to increase line 1 by \$1,750 from \$2,650 to \$4,400 for a new PO total of \$4,400. Additional videography services - live streaming feature for April 2 event.
- **Goods line item description:**
 - Change order to PO-100xxxxxxx. Adding \$1,750 for this event, in addition to \$2,650 on the original PO. Total PO with change is \$4,400.
- **Goods line quantity requested:**
 - 1
- **Goods line unit cost:**
 - \$4,400

Example 3:

- **Internal memo:**
 - Change order to PO-100xxxxxxx to increase line 1 by \$293 from \$1,088 to \$1,381 for a new PO total of \$1,381. Internal hard drive 8TB drive is for a group workstation to process large data sets. Price of hard drives went up and a change order request was necessary to reflect correct price charged.
- **Goods line item description:**
 - Change order to PO-100xxxxxxx. Increase line 1 by \$293 from \$1,088 to \$1,381
- **Goods line quantity requested:**
 - 1
- **Goods line unit cost:**
 - \$1,381

Single line quantity increase at the same price per item

- **Internal memo:**
 - Change order to PO-100xxxxxxx to increase quantity on line 1 from 3 to 12. Price per item remains same at \$50 each. Original PO was for \$150, new PO total should be \$600. Items required for lab research purposes and are no longer on backorder.
- **Goods line item description:**
 - Change order for PO-100xxxxxxx increase quantity of line 1 from 3 to 12 each for a new PO total of \$600.
- **Goods line Quantity Requested:**
 - 1
- **Goods Line Unit Cost:**
 - \$600

Add a line to PO

- **Internal memo:**
 - Change order to PO-100xxxxxxx to add a line for Tariff charges. Add Line 2, 1 ea. Tariff charge at \$9.14 for a new PO total of \$568.14
- **Goods line item description:**
 - Change order to PO-100xxxxxxx to add a line for Tariff charges.

- **Goods line quantity requested:**
 - 1
- **Goods line unit cost:**
 - \$568.14

Update worktags only

- **Internal memo:**
 - H1-B Filing fees for Postdoctoral scholar. Change order to PO-100xxxxxxx to update work tags on both lines from current worktags CCxxxxx-BLxxxx-FDxxx-PGxxxxxx-ASxxxxxx to new CCxxxxx-BLxxxx-FDxxx-AExxxxxx. The total PO amount and everything else will remain the same. Only the work tags are changing.
- **Goods line item description:**
 - Change order to PO-100xxxxxxx to update worktags on BOTH Lines. (list new worktags in their appropriate fields as they should appear on updated PO)
- **Goods line quantity requested:**
 - 1
- **Goods line unit cost:**
 - Original PO amount

Complex line changes and additions

- **Internal memo:**
 - Change order to PO-100xxxxxxx, updated quote with higher price and additional repair costs needed on lab equipment. Increase line 1 from \$152 to \$153.78; add line 2 for Labor at \$40. Add shipping for \$18.97. New PO amount will be \$212.75.
- **Goods line item description:**
 - Change order to PO-100xxxxxxx, increase line 1 from \$152 to \$153.78; add line 2 for Labor at \$40. Add shipping for \$18.97. New PO amount will be \$212.75.
- **Goods line quantity requested:**
 - 1
- **Goods Line Unit Cost:**
 - \$212.75

Change order to increase ICA without date extension

- **Internal memo:**
 - Change order for PO-100xxxxxxx request for payment for copyediting and formatting services on multiple reports in preparation for publication. Additional hours to cover needed copy-editing request for published journal. From \$1500 to \$4000 (increase of \$2500). Signed ICA Addendum attached. Work will continue within the same dates as listed on PO.
- **Goods line item description:**
 - Change order for PO-100xxxxxxx from \$1500 to \$4000 (increase of \$2500). PO Work will continue within the same dates as listed on original PO.
- **Goods line Quantity Requested:**
 - 1
- **Goods Line Unit Cost:**
 - \$4,000.00